Required Report - public distribution

Date: 9/12/2014

GAIN Report Number: AU1414

Austria

Exporter Guide

Road Map to the Austrian Market

Approved By:
Kelly Stange
Prepared By:
Roswitha Krautgartner

Report Highlights:
In 2013, the consumer-oriented sector accounted for 56 percent of total agricultural, fish and forestry imports from the United States, worth $ 69.1 million. Austrian consumer trends are creating good market opportunities for organic, health, diet, convenience, and ‘sustainable’ food products. Market opportunities for U.S. products include fish and seafood products, nuts, wine, bourbon, pet foods, dried fruits, fruit juices, snack foods, and high quality beef. Compared to other EU countries, the Austrian economy is performing relatively well. Austrian consumer expenditures have grown steadily in recent years and this is helping to drive up food and beverage sales. Although domestic, German, and European products tend to dominate Austrian food retail shelf space, there are good market opportunities for U.S. products, particularly at the upper end of the market. Consumer-oriented food and beverage products remain the most important agricultural import category from the United States.

Post:
Vienna

Table of Contents

I. Market Overview

Economic Situation and How It Affects Consumer Spending and Sales of U.S. Products

Austria has a small but highly developed market economy with a high standard of living. It occupies a strategic position in the center of Europe and is closely tied to other EU (European Union) economies, especially Germany's. Austria is a part of the EU single market and customs union and is a Eurozone member. The Austrian economy is characterized by a large service sector, a strong industrial sector, and a small, but highly developed, agricultural sector. Austria is an export-driven economy and EU countries are its most important trading partners.

The Austrian economy tends to perform better than the EU average. Austria has one of the highest GDPs (gross domestic product) per capita in the entire EU. Given the sluggish economic development in the Eurozone, the Austrian economy is performing relatively well. After the sharp recession in 2009, caused by slack export demand, the Austrian economy started recovering in 2010 to 2012. In 2013, the Austrian economy was more and more affected by sluggish performance in the EU and only showed a growth of 0.3 percent (but still higher than the zero average EU economic growth in 2013) and is expected to moderately grow again in the coming years. For 2014, the Austrian Institute of Economic Research (WIFO) forecasts a 1.4 percent and for 2015 a 1.7 percent growth of the Austrian economy. (Source: WIFO)

Unemployment rate reached a new peak in 2013, despite the Austrian economic rebound, although it is still one of the lowest in Europe. In 2013, the unemployment was at 4.9 percent which is considerably lower than the EU average. The Austrian inflation rate was at a low 2 percent in 2013 which exceeded the even lower EU average. (Source: Statistik Austria)

Austrian consumer expenditures have grown steadily in recent years and food and beverage sales have benefited. From 2010 to 2013, consumer expenditures on food and non-alcoholic beverages grew 8.7 percent. In 2013, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 13.4 percent of total consumer expenditures. The share of food and beverage expenditures is fairly stable. During the period 2010 to 2013 Austrian expenditures on food and non-alcoholic beverages grew by 6.3 percent to Euro 2,031 per capita. (Source: Euromonitor)

Consumer Expenditures Austria in Euro Per Capita - Value at Current Prices

Consumer Expenditures	2010	2011	2012	2013	2014*	2015*
Consumer expenditures	18,932.1	19,735.2	20,258.0	20,583.9	21,100.1	21,745.0
Consumer expenditures on food and non-alcoholic beverages	1,911.1	1,972.8	2,026.5	2,030.6	2,103.6	2,146.6
Consumer expenditures on alcoholic beverages and tobacco	647.1	676.1	695.9	721.2	714.6	731.9

* Forecast
Source: Euromonitor

Although foods and beverages from Austria, Germany, and other EU countries dominate Austrian retail shelf space, there are good opportunities for U.S. products, particularly at the upper end of the market. Consumer oriented food and beverage products remain the most important agricultural imports from the United States. In 2013, the consumer oriented sector accounted for 56 percent of total agricultural, fish and forestry imports from the United States worth $ 69.1 million (source: Global Trade Atlas). During the same period fish and seafood imports from the United States were at $ 2.0 million. Official import numbers do not include significant and growing transshipments of U.S. products from other EU countries and actual U.S. trade may be considerably larger.

Austrian Imports from the United States of Consumer-Oriented and Fishery Products

Product Category	Value, Thousands of $ in 2013	Growth 2009 - 2013 in %
OTHER CONSUMER ORIENTED PRODUC	26,667	90.1
TREE NUTS	14,718	40.9
RED MEATS,FRESH/CHILLED/FROZEN	8,088	409.0
PROCESSED FRUIT & VEGETABLES	5,061	12.3
WINE & BEER	4,956	-32.5
FRUIT & VEGETABLE JUICES	3,342	58.5
EGGS & PRODUCTS	1,882	-51.2
PET FOODS (DOG & CAT FOOD)	1,686	-12.3
SNACK FOODS (EXCLUD. NUTS)	1,284	-32.6
OTHER FISHERY PRODUCTS	963	-25.7
FRESH FRUIT	704	406.5
MOLLUSCS	691	91.9
RED MEATS, PREPARED/PRESERVED	450	1,351.6
SALMON	208	56.4
CRUSTACEANS	169	838.9
FRESH VEGETABLES	58	-91.8
GROUNDFISH & FLATFISH	52	-40.9
DAIRY PRODUCTS (EXCL. CHEESE)	26	∞
BREAKFAST CEREALS/PANCAKE MIX	19	∞
NURSERY PRODUCTS & CUT FLOWERS	11	-89.9
POULTRY MEAT	2	0.0
CHEESE	0	0.0
SURIMI	0	0.0

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.5 million (2013). The number of single households and childless double working partnerships is rising. From 2003 to 2013 there was an increase of 29.4 percent in single-person households. The number of single households reached 1.36 million in 2013, which corresponds to 36.7 percent of all households. In 2013, an average household consisted of 2.26 people. The median age of Austria's population is gradually rising. In 2013, 18.2 percent of the total population was 65 years and older. (Source: Statistik Austria)

Food Market and Trends

When responding to polls, consumers usually express a preference for high quality foods; however, when it comes to actually buying, price appears to be the major purchasing factor for a majority of the population. One result of the global economic recession starting in 2008/09 was that Austrian consumers tended to buy lower-priced alternate products but this is changing again with the recovering economy. For special events most people, even in lower income brackets, are willing to spend more for "exclusive" products. In addition, the higher income and gourmet market segments (which regularly buy high priced foods) are growing.

The traditional Austrian diet is rich and based on meat, flour, and vegetables. Cakes and bakery products are important parts of the diet.

There is an increasing interest in healthy lifestyles, especially among younger consumers concerned about excess calories and healthy diets. The younger generation also appreciates trying new products and is a logical segment to aim for with many new food product introductions.

Biotech (also called 'GMO') food products have a very negative image among the Austrian public. Food products that have to be labeled as biotech do not sell in Austria and cannot be found in Austrian retail stores.

A counterpoint to the negative view of biotech foods is Austria's strong and still growing market for organic agricultural and food products. The market share of organics in food retail accounts for about 7 percent and Austria has the highest percentage of organic farms in the EU. In 2013, almost 7 percent of all fresh food purchases in Austria were organic.

Driven by the Austrian government and NGOs Austrian consumers are highly aware of environmental issues. This creates a rapidly growing market for sustainably produced food products. Reacting to this trend retail chains started launching private labels promoting "sustainability". The REWE retail chain, for example introduced the "Pro Planet" brand that claims to offer food products that are produced in an environmentally and social responsible way. The discounter Hofer promotes its improved carbon footprint for organic products sold under the label "Zurueck zum Ursprung". Furthermore some retailers promote fair trade products.

An increasing awareness of allergies is also raising the demand for special allergy-related food products.

Due to the increasing number of single households and the rising number of older people seeking companionship, the number of pets should continue to increase, further stimulating demand for pet food.

The rise in single households also boosts demand for convenience products and for food eaten outside the home. Singles are not only young urban working people but also retired persons. The rising number of elderly people, many of whom have significant disposable income, creates additional demand for health and specialty nutrition products.

Advantages and Challenges for U.S. Suppliers on the Austrian Market

Advantages/Opportunities	**Challenges/Constraints**
High income level of the Austrian population and stable economy	Foods containing or made from biotech products are not accepted by consumers and retailers
Urban population growing, which boosts demand for international food	Competition from EU member states
U.S. style food is popular, especially among the younger generation	Products must meet strict Austrian/EU/retailer requirements; regional and sustainable products are highly promoted
Good reputation of certain U.S. products like dried fruits and nuts	Austrian buyers demand quality but also low prices
Growing market for organic, sustainable and health food products	High promotion costs to increase consumer awareness
The Austrian climate limits growing seasons and types of products grown	Highly concentrated food retail market
Good infrastructure, efficient distribution system, most importers speak English	Difficult to acquire shelf space in large supermarket chains
Only fresh water fish production (landlocked country); 95 percent of Austrians fish and seafood consumption needs to be imported	Growing retailers’ promotion and consumer awareness of carbon footprint results in disadvantage for products with long-distance shipping
Growing interest in ethnic foods and sea foods due to rising vacations in distant and coastal areas	Lack of awareness of high U.S. quality by consumers
Growing pet food market	Retailers rarely import products into Austria, they prefer purchases from central buyers including other member states (mainly Germany)

II. Exporter Business Tips

Local Business Customs

In general, food retailers buy domestic and imported products from Austrian and/or German wholesalers. The large supermarket chains have their own purchasing sections, which buy and store foodstuffs centrally for their own retail stores. The central purchasing sections import directly in some instances. However, some items are purchased through wholesale importers (i.e. almonds). Due to the strong concentration of the food retail sector, the supermarket chains are very powerful vis-a-vis producers and slotting fees for retail space are the norm.

General Consumer Tastes and Preferences

Traditionally, Austrians have conservative tastes which are reflected in the local cuisine and in local production methods and marketing. However, the younger generation appreciates trying new food products and beverages. Latest food trends stress again the traditional diet but prepared in a more modern way and using high quality products and ingredients.

Austrians prefer foods without artificial flavors, stabilizers, emulsifiers, and preservatives. In addition, consumers reject foods containing biotech products. For this reason, the leading supermarket chains have banned such products from their shelves.

Organic food products have developed from a niche market to having a significant market share. As of today, sales of organic products account for about 7 percent of retail sales. Industry watchers believe that organic products may someday reach 10 percent of the total food market. “Similarly, there is significant interest in “sustainable” food products. Recently, almost all Austrian retail chains introduced their own voluntary “sustainability” strategies and labels to promote products with environmental, social and economic benefits. “Light” products are also on a rising trend; however, consumers do not seem to tolerate a loss in flavor as compared to “normal” products.

Beef and pork consumption has been somewhat declining in the last couple of years, whereas poultry consumption has been increasing. As a result of the slack economy, consumers tend to buy less expensive meat cuts. Due to increasing health awareness fish consumption is on a rising trend. Cheese consumption, which is already high, continues to rise. This is particularly true for semi-hard and fresh cheeses.

With fruit juices, tartness (higher acidity) is preferred over sweeter products. This applies also to white wines. Jams and marmalade are more appealing to Austrians if fruit pieces are included and if they are not too sweet. Cereals sell better if they are crunchy.

Food Standards and Regulations

See GAIN report:
[Food and Agricultural Import Regulations and Standards Report - Austria:](#)
Or search the USDA GAIN database:
http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

General Import and Inspection Procedures

Incoming goods go either to the customs storage (small) or to a freight forwarder's facility at transport terminals or airports. Storage and removal from storage is carried out under the supervision of a customs officer who compares the documents with the commodities. Later, the invoice for import duty is issued. Food inspectors at the port of entry do not routinely check packaged foods. However, the customs officer may take samples to double check for ingredients (sugar, milk powder, alcohol) and that customs duties are paid for these ingredients according to their proportion of the processed product.

Veterinary and customs import documents must be in German. Veterinary certificates are usually bi-lingual. There is no appeal of decisions by the customs office or the veterinary service.

If an importer objects to the quality of the product, the case can be brought to the arbitration center.

Complete information on EU import rules for food products may be found at:
http://www.usda-eu.org/trade-with-the-eu/eu-import-rules/

III. Market Sector Structure and Trends

Food Market Structure

Since EU accession in 1995, concentration in the food industry and food retail sector has accelerated. Many food-processing companies are too small to survive alone when exposed to the larger EU market and many have merged with larger national or foreign firms. Apart from Spar (Internationale Spar Centrale BV), all leading food retailers in Austria are part of large German retailer groups. The top three retail chains have a remarkable 72 percent market share (2013). In 2013, total sales of Austrian food retailers were at Euros 19.8 billion.

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2008	2009	2010	2011	2012	2013*
Rewe Group	5,508.6	5,467.7	5,462.5	5,462.1	5,517.0	5,623.5
Internationale Spar Centrale BV	4,783.1	4,907.4	5,047.7	5,247.0	5,343.4	5,446.6
Aldi Group	3,300.0	3,350.0	3,278.0	3,245.2	3,248.4	3,251.7
Total Food Retail	19,077.1	19,167.4	19,191.4	19,278.5	19,665.6	19,778.9

* Forecast
Source: Euromonitor International

Domestic Industry Capacity versus Availability of Foreign-Supplied Products

More than three-quarters of all agricultural supplies, including ingredients for the food industry, comes from other EU countries. Regarding imports of processed foods, about 90 percent come from other EU countries.

The strongest branch of Austria's food industry is the beverage sector, particularly the brewing industry and the fruit juice industry. The latter imports concentrated citrus juices, particularly orange juice. There is also a strong confectionary and meat industry.

Trends in Promotional/Marketing Strategies and Tactics

The most efficient advertising is television, which nonetheless tends to be more expensive in Austria than in the United States. The industry uses this medium for promoting food and pet food brands, and the two largest supermarket chains have regular TV spots. Supermarket, hypermarket and discounter chains have their own weekly or bi-weekly flyers in which products available and discounted products in their stores are advertised. These fliers reach a wide range of interested purchasers and thus are regarded as efficient. In-store promotions can also be very successful. (See IV. Best High-Value Product Prospects).

Trends in Tourism Sales, Holiday Gift sales, and Internet Sales

Tourism contributed about Euro 17.2 billion to Austria's GDP (Gross Domestic Product) in 2013 (5.5 percent of GDP) and plays an important economic role. In 2013, some 133 million overnight stays by tourists were logged. The major share of tourists comes from Germany followed by Netherlands. The main tourist areas are the western and southern alpine regions and the capitals of the federal states.

In general, tourists, particularly those from Germany, favor the local Austrian cuisine during their vacation. However, in recent years ethnic foods have become more popular (because of immigration and Austrians traveling abroad) and the demand for seafood has increased.

In recent years some food retailers started food internet sales but internet sales for food products still remain marginal.

IV. Best High-Value Product Prospects

Consumer oriented and fishery products offering good U.S. export opportunities are:

Product Category	Total Austrian Imports 2013 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2013 in 1000 of U.S. $ *)	Market Attractiveness for USA
Fish and Seafood Products	511,635	1,959	The Austrian market offers small but lucrative opportunities for fish and seafood products. Fish consumption in Austria is growing as consumers associate fishery products with a modern healthy diet. Domestic fish production is marginal and limited to fresh water fish like trout and carp. Due to transshipment within the EU, the real value of imports from the United States is thought to be much higher than indicated in customs statistics. Best prospects for U.S. fish and seafood exports are salmon, lobster, shrimps, crabs, caviar substitutes, catfish and scallops. In recent years the demand for frozen U.S. pollack filets has increased significantly.
Tree Nuts	137,173	14,718	In 2013, the United States was the fourth largest (by value and quantity) supplier of tree nuts to Austria. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include walnuts, pistachios, pecans, and hazelnuts.

Product Category	Total Austrian Imports 2013 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2013 in 1000 of U.S. $ *)	Market Attractiveness for USA
Wine	279,160	5,052	Austria has traditionally a high share of domestic wine consumption. However, good prospects exist for "new world wines" including those from the United States. In 2013, the United States was the seventh most important supplier (by value) of wine to Austria. U.S. wine sales increased in retail stores including discounters who mainly carry inexpensive U.S. wines.
Pet Foods	369,412	1,881	Since dog and cat population in Austria is steadily increasing, the demand for dog and cat food is also rising. Austrian companies dominate the pet food market, however, U.S. pet food and ingredients have good market prospects.
Processed Fruits and Vegetables	793,537	4,956	Austrian imports of processed fruits and vegetables – mainly prepared nuts/seeds and dried fruits – are constantly growing. Those products are mostly used as ingredients by the food-processing sector for the production of pastries and breakfast cereals. Dried fruits and prepared nuts are also popular as a snack.
Fruit and Vegetable Juices	373,084	3,342	A very strong fruit juice industry makes Austria one of the most important juice importers worldwide. The demand for fruit juices has been steadily growing over the past years. Good opportunities for U.S. fruit juices in the Austrian market are citrus and cranberry juices.
Snack Foods (Excl. Nuts)	897,022	1,284	The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.
Red Meats Fresh/ Chilled/ Frozen	721,799	8,088	Limited but lucrative and increasing opportunities exist for U.S. hormone free high quality beef, game and exotic meat for the upper scale gastronomy.
Eggs & Products	93,952	1,686	In 2013, the United States was Austria's number two supplier of albumins and albumin derivates which are used in the food processing industry.
Whiskies (Bourbon)	35,638	11,630	When it comes to hard liquor Austrian traditionally drink Schnapps but there is also a good market for Whiskeys. The United States is the second largest supplier, after the United Kingdom.

Source: *) Global Trade Atlas

V. Key Contacts and Further Information

American Embassy
Office of Agricultural Affairs
Boltzmanngasse 16
A-1090 Wien
Phone: + 43 (1) 31 339 / ext 2364 or 2293
Email: agvienna@fas.usda.gov
Website: http://www.usda-mideurope.com/

Bundesministerium fuer Wissenschaft, Forschung und Wirtschaft
(Federal Ministry of Science, Research and Economy)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100 – 0
Email: service@bmwfj.gv.at
Website: http://www.bmwfw.gv.at

Bundesministerium fuer Land- und Forstwirschaft, Umwelt und Wasserwirtschaft
(Federal Ministry for Agriculture and Forestry, Environment and Water Management)
Abteilung III 2
(Division III 2)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100 - 0
Email: infomaster@lebensministerium.at
Website: http://www.bmlfuw.gv.at/

Bundesministerium für Gesundheit
(Federal Ministry of Health)
Radetzkystraße 2
1030 Wien
Tel. +43-1/711 00-0
Fax +43-1/711 00-14300
Website: http://www.bmg.gv.at

Agrarmarkt Austria (AMA)
(Agricultural Market Austria)
Dresdnerstr. 70
A-1200 Wien
Phone: + 43 (1) 33 151 - 0
Fax: + 43 (1) 33 151 299
Email: office@ama.gv.at
Website: http://www.ama.at

Wirtschaftskammer Oesterreich
(Austrian Economic Chamber)
Wiedner Hauptstr. 63
A-1045 Wien
Phone: + 43 (5) 90 900
Fax: +43 5 90 900 5678
Email: office@wko.at
Website: https://www.wko.at

Oesterreichische Agentur fuer Gesundheit und Ernaehrungssicherheit
(Austrian Agency for Health and Food Safety)
Spargelfeldstrasse 191
Postfach 400
A-1226 Wien
Phone: + 43 (5) 0555 – 0
Fax: + 43 (5) 0555 - 22019
Website: http://www.ages.at/

Lebensmitteluntersuchungsanstalten der Laender (Food Safety Institutes of the Austrian federal states):
https://www.verbrauchergesundheit.gv.at/dateien/lebensmittel/LM_Kontrolle_LMUAS_adressen_agentur.pdf?4cxx82

Institut für Lebensmitteluntersuchung Wien
Spargelfeldstraße 191
1220 Wien
Phone: +43 505 55-35 107
Fax: +43 505 55-35 109

Institut für Lebensmitteluntersuchung Linz
Wieningerstraße 8
4020 Linz
Phone: +43 50555 41701
Fax: +43 50555 41709

Bundesanstalt fuer Lebensmitteluntersuchung Salzburg
Innsbrucker Bundesstraße 47
A-5020 Salzburg, Austria
Phone: +43 50555 44100
Fax: 43 50555 44109

Bundesanstalt fuer Lebensmitteluntersuchung Graz
Beethovenstr. 8
A-8010 Graz, Austria
Phone: +43 50555 61303
Fax: +43 50555 61309

Bundesanstalt fuer Lebensmitteluntersuchung Innsbruck
Technikerstr. 70
A-6020 Innsbruck, Austria
Phone: + 43 50 555 71222
Fax: + 43 50 555 71201

Lebensmitteluntersuchungsanstalt der Stadt Wien
Henneberggg. 3
A-1030 Wien, Austria
Phone: +43 (1) 4000 97955
Fax: +43 (1) 4000 9997955
Website: http://www.wien.gv.at/lebensmittel/index.html

Appendix I

Table A. Key Trade and Demographic Information

AUSTRIA

KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural, Fish and Forestry Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2013	17,166 / 0.72%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2013	9,737 / 0.62%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2013	512 / 0.38%
Total Population (Millions)/Annual Growth Rate (%)[3)]	2013	8.5 / 0.5%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2013	68% / 1.4%
Number of Major Metropolitan Areas	2012	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2013	$42,600
Unemployment Rate (%)[3)]	2013	4.9%
Consumer Per Capita Food Expenditures (Incl. Beverages and Tobacco) (U.S. Dollars) [5)]	2013	$3,654
Percent of Female Population Employed (15 to 64 years old)[3)]	2013	53%
Average Exchange Rate 2013 (US$1 = 0.753 Euro) [4)]	2013	0.753

1) Source: Global Trade Atlas
2) Source: CIA World Factbook
3) Source: Statistik Austria
4) Source: OANDA
5) Source: Euromonitor

Table B. Consumer Food & Edible Fishery Product Imports

Austria Imports (In Millions of U.S. Dollars)									
	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
CONSUMER-ORIENTED AGRICULTURAL TOTAL	9,135	9,054	9,737	56.3	56.5	69.1	0.62	0.62	0.71
SNACK FOODS (EXCLUD. NUTS)	805	796	897	1.4	1.3	1.3	0.17	0.17	0.14
BREAKFAST CEREALS/PANCAKE MIX	69	73	70	0.0	0.0	0.0	0.01	0.03	0.02
RED MEATS,FRESH/CHILLED/FROZEN	741	714	722	4.1	6.6	8.1	0.55	0.92	1.12
RED MEATS, PREPARED/PRESERVED	334	330	361	0.2	0.2	0.5	0.05	0.07	0.12
POULTRY MEAT	357	350	368	0.0	0.0	0.0	0.00	0.00	0.01
DAIRY PRODUCTS (EXCL. CHEESE)	447	417	458	0.2	0.0	0.2	0.05	0.01	0.04
CHEESE	489	495	527	0.0	0.0	0.0	0.00	0.00	0.00
EGGS & PRODUCTS	90	100	94	1.6	2.2	1.7	1.80	2.22	1.79
FRESH FRUIT	702	706	789	0.5	0.9	0.7	0.07	0.12	0.09
FRESH VEGETABLES	532	502	544	0.0	0.1	0.1	0.01	0.02	0.01
PROCESSED FRUIT & VEGETABLES	770	747	794	5.6	5.2	5.0	0.73	0.70	0.62
FRUIT & VEGETABLE JUICES	359	410	373	3.8	4.0	3.3	1.07	0.98	0.90
TREE NUTS	121	110	137	13.5	10.4	14.7	11.17	9.44	10.73
WINE & BEER	333	348	361	5.2	4.8	5.1	1.56	1.38	1.40
NURSERY PRODUCTS & CUT FLOWERS	485	454	462	0.0	0.0	0.0	0.00	0.00	0.00
PET FOODS (DOG & CAT FOOD)	198	259	369	2.3	2.2	1.9	1.18	0.83	0.51
OTHER CONSUMER ORIENTED PRODUC	2,304	2,242	2,410	17.8	18.6	26.7	0.77	0.83	1.11
FISH AND SEAFOOD PRODUCTS TOTAL	460	442	512	5.3	2.0	2.0	1.14	0.45	0.38
SALMON	60	59	75	1.0	0.2	0.1	1.73	0.31	0.08
SURIMI	0	0	0	0.0	0.0	0.0	0.00	0.00	0.00
CRUSTACEANS	60	59	66	0.0	0.2	0.2	0.06	0.26	0.31
GROUNDFISH & FLATFISH	13	13	16	0.0	0.1	0.0	0.10	0.52	0.16
MOLLUSCS	15	16	15	0.6	0.5	0.7	4.20	2.89	4.59
OTHER FISHERY PRODUCTS	311	296	339	3.5	1.1	1.0	1.13	0.38	0.28

AGRICULTURAL PRODUCT TOTAL	12,864	12,439	13,427	85.0	89.8	108.3	0.66	0.72	0.81
AGRICULTURAL, FISH & FORESTRY TOTAL	16,499	15,869	17,166	107.0	103.0	123.4	0.65	0.65	0.72

Source: Global Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

Consumer Oriented Agricultural Total (In Millions of U.S. Dollars)			
Top 15 Supplier	2011	2012	2013
Germany	2,751	2,927	3,035
Italy	831	904	904
Netherlands	522	526	533
Switzerland	260	267	339
Hungary	246	284	292
Spain	234	277	289
France	244	275	272
Poland	190	213	196
Belgium	127	127	144
Turkey	93	110	135
Czech Republic	76	88	84
United Kingdom	58	69	67
Brazil	63	64	66
Greece	43	48	58
Denmark	56	57	56
World	6,564	7,038	7,325

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Supplier	2010	2011	2012
Germany	112.5	125.6	132.1
Netherlands	37.3	34.3	34.2
Norway	20.5	17.7	23.4
Italy	15.5	17.5	19.5
Denmark	17.5	17.7	19.1
Thailand	9.7	8.2	15.5
Vietnam	14.0	12.1	15.4
Poland	11.7	13.0	15.3
Slovenia	6.1	5.6	12.5
France	9.8	9.7	10.9
Lithuania	3.2	3.7	7.7
Spain	4.3	4.8	7.6
China	5.9	6.6	5.8
United Kingdom	4.5	5.3	5.1
Morocco	3.0	4.2	5.0
World	331.3	343.3	384.3

Source: Global Trade Atlas

Related Reports

For most recent reports please search the public USDA/FAS GAIN database:
http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

GAIN Reports
Negative List for Novel Foods and Ingredients|Exporter Guide|Brussels USEU|EU-28|7/22/2014 The current Novel Foods Regulation 258/97 requires that all food and food ingredients that have not been used for human consumption in the EU before May 15, 1997 be considered a novel food or a novel food ingredient. The broad scope of what is currently considered a novel food presents challenges for U.S. exporters in determining the legal status of specific substances or ingredients. This report provides an overview of the current novel foods regulatory environment and uses RASFF alerts to co... Negative List for Novel Foods and Ingredients_Brussels USEU_EU-28_7-14-2014
The EU's Country of Origin Labeling (COOL) Policy|FAIRS Subject Report|Brussels USEU|EU-28|3/24/2014 The EU's "Food Information to Consumers" Regulation 1169/2011 will become applicable on December 13, 2014. This regulation introduces a number of new mandatory labeling requirements, including country of origin labeling (COOL) for meat other than beef. When the FIC Regulation was adopted in 2011, EU legislators agreed that mandatory COOL should be extended to more food products and ingredients. Article 26 of the FIC Regulation sets out detailed rules for COOL and lists the different actions t... The EU's Country of Origin Labeling (COOL) Policy_Brussels USEU_EU-28_3-19-2014
New EU Rules on Dietetic Foods|FAIRS Subject Report|Brussels USEU|EU-28|2/7/2014 The EU’s new dietetic foods regulation 609/2013, adopted in June 2013, will become applicable on July 20, 2016. The scope of this regulation is limited to infant formula and follow-on formula, processed cereal-based food and baby food, food for special medical purposes and total diet replacement for weight control. Under the new rules, pictures of infants are no longer allowed on labels and no pictures or text may idealize the use of such formula. Foods that no longer fall with the scope of ... New EU Rules on Dietetic Foods_Brussels USEU_EU-28_2-5-2014
Proposal for a New Novel Foods Framework Regulation|FAIRS Subject Report|Brussels USEU|EU-28|2/7/2014 On December 18, 2013, the European Commission presented its long-awaited proposal for a revision of the current Novel Foods Regulation 258/97. An earlier attempt to revise the current novel foods rules failed in March 2011when the European Parliament and Council could not reach agreement on how to regulate food from animal clones. Separate legislation on animal cloning was presented on the same day as the novel foods proposal. The main objectives of the novel foods proposal are to introduce ... Proposal for a New Novel Foods Framework Regulation_Brussels USEU_EU-28_2-5-2014
Austrian Wine 2014|Wine Beverages Product Brief|Vienna|Austria|2/5/2014 Austrian 2014 wine production (grape harvest 2013) is estimated at 2.25 mn hl which is about 6 percent lower than the five-year’s average but a 5 percent increase compared to the low results of 2013. Quality of the 2014 production is expected to be good. Although Austrian consumers prefer locally grown light white wines there are good prospects for “new world wines” including those from the United States. Austrian Wine 2014_Vienna_Austria_2-3-2014
FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Brussels USEU|EU-27|2/5/2014 This guide provides an overview of export health certificates needed for exporting plants, animals, foods and other animal origin products to the EU. U.S. regulatory agencies have been informed of the wide range of certificates changes that have occurred in the past months and have updated their export manuals to reflect those changes. Sections updated: All sections. Food and Agricultural Import Regulations and Standards - Certification_Brussels USEU_EU-27_1-15-2014
EU-U.S. Organic Trade Update - January 2014|Special Certification - Organic/Kosher/Halal Market Development Reports Agricultural Situation|Vienna|EU-28|1/28/2014 The first eleven months of 2013 (January through November), the United States exported $7.6 million worth of organic products covered under the organic HS codes to the European Union. This is an increase of 55 percent compared to the same period in 2012. This report includes an update on EU-U.S. trade of organic products where an HS code for “certified organic” fresh or processed agricultural products has been introduced. The report does not cover the entire EU-U.S. organic trade but the sta... EU-U.S. Organic Trade Update - January 2014_Vienna_EU-28_1-24-2014

FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Vienna|Austria|1/23/2014 This report covers only specific export certificate requirements by Austria, which are different from EU requirements. Food and Agricultural Import Regulations and Standards - Certification_Vienna_Austria_12-24-2013
Road Map to the Austrian Market|Exporter Guide|Vienna|Austria|1/20/2014 Compared to other EU countries, the Austrian economy is performing relatively well. Austrian consumer expenditures have grown steadily in recent years and this is helping to drive up food and beverage sales. Although domestic, German, and European products tend to dominate Austrian food retail shelf space, there are good market opportunities for U.S. products, particularly at the upper end of the market. Consumer-oriented food and beverage products remain Austria's most important agricultural ... Exporter Guide_Vienna_Austria_12-24-2013
FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Brussels USEU|EU-27|1/2/2014 This report updates each of the nine sections and provides an overview of food laws currently in force in the EU-28. Developments in EU food legislation and initiatives that may have an impact on U.S. exports of food and agricultural products are highlighted on a blue background. For updates of the information provided in this report check the USEU/FAS website www.usda-eu.org. Food and Agricultural Import Regulations and Standards - Narrative_Brussels USEU_EU-27_12-30-2013
FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Vienna|Austria|12/27/2013 This report outlines specific requirements for food and agricultural products imports into Austria. Austria as a member of the European Union follows the EU directives and regulations. It is recommended that this report be read in conjunction with the EU Food and Agricultural Import Regulations and Standards. Food and Agricultural Import Regulations and Standards - Narrative_Vienna_Austria_12-23-2013
The EU's Traditional Specialties Guaranteed Quality Scheme Explained|FAIRS Subject Report|Brussels USEU|EU-27|12/17/2013 A reform of the EU's quality labeling schemes entered into force on January 3, 2013. Regulation 1151/2012 sets out rules on the EU's quality labeling schemes "Protected Designation of Origin" (PDO), "Protected Geographic Indication" (PGI), and "Traditional Specialties Guaranteed" (TSG). This regulation introduces a new TSG scheme that guarantees better protection of registered names. As "Mozarella" is one of the registered names under the old TSG scheme, the "better protection" aspect of the ... The EU's Traditional Specialties Guaranteed Quality Scheme Explained_Brussels USEU_EU-27_12-12-2013
Health Claims - New EU Regulation on Generic Descriptors|FAIRS Subject Report|Brussels USEU|EU-27|11/13/2013 New European Commission Regulation 907/2013 sets out rules for the use of "generic descriptors" which could be interpreted by consumers as health claims. Generic descriptors such as "digestive biscuit" and "cough drop" would normally be banned under the EU's Nutrition and Health Claims Regulation because they have not been evaluated by the European Food Safety Authority. Under the new regulation, companies using generic descriptors may apply for an exemption from this ban. This report describ... Health Claims - New EU Regulation on Generic Descriptors_Brussels USEU_EU-27_11-6-2013
Changes to Export Certification for U.S. Grape Juice|FAIRS Subject Report|Brussels USEU|EU-27|7/15/2013 As of July 1, 2013, U.S. grape juice producers are allowed to use a "Simplified VI-1" document to export grape juice to the EU. Companies wishing to export grape juice can self-certify compliance with EU rules and it is no longer needed for the U.S. Government to sign the certificate. A sample certificate and explanatory note are provided at the end of this report. Changes to Export Certification for U.S. Grape Juice_Brussels USEU_EU-27_7-10-2013
GM-Free Labeling Conference in the European Parliament|Biotechnology and Other New Production Technologies Trade Policy Monitoring FAIRS Subject Report|Brussels USEU|EU-27|3/18/2013 On March 6, 2013, the political group Greens/European Free Alliance organized a GM-free labeling conference in the European Parliament. Part of the conference was dedicated to the study commissioned by DG SANCO to assess existing GM-free labeling schemes in the EU Member States and the need for harmonization. This report provides a brief read-out of that part of the conference. GM-Free Labeling Conference in the European Parliament_Brussels USEU_EU-27_3-13-2013

2012|Retail Foods|Vienna|Austria|1/15/2013

Despite the difficult economic situation in the Euro zone the Austrian food retail value grew by 1.3 percent and had sales of 19.5 billion Euros in 2011. With the expected recovery of the economy a slightly increased growth is forecast for 2012 and the following years. Food retail trends show increasing number of private labels and high quality, organic, and sustainable products in supermarkets as well as discounters. U.S. products with good prospects include tree nuts, wine, processed fruits...

Retail Foods_Vienna_Austria_12-20-2012